



# Next Generation Learning in Law Firms

## One Size Does Not Fit All

By Brie Stampe and Tami Schiller

Just imagine . . . a lateral partner joins the firm . . . and prior to her first day, she has already connected with her new practice group peers and has been paired with a technology consultant who will look after her learning needs. The technology consultant meets with the lawyer in her first week to learn about how she practices law, who her clients are and what they expect of her, and to establish a schedule for follow-up consultation. The consultant develops a unique learning plan for the lawyer that puts education into the context of daily work and identifies her established areas of expertise that may be leveraged by other workgroup team members. In the meantime, she is hooked into the firm's knowledgebase of relevant information, learning tools and subject matter experts. She quickly learns who is in her community of peers and how to find information and answers to her questions the moment she has a need.

**W**elcome to Next Generation Learning in law firms. Learning happens. It's inevitable. What's changing is how people learn and how professionals in the training industry need to reinvent and re-engineer formal and informal learning in law firms. Today, we are already seeing signs and indicators of change. Within five to ten years, we believe that traditional classroom technology training as we know it will become extinct in law firms. New forms of learning will emerge and classroom study will look very different than it does today. It will, in fact, become a new generation of learning.

The forces driving this learning evolution (or *revolution*) are three-fold: the significantly changing landscapes of legal and non-legal technology, law firm business models, and legal technology users. The convergence of these three rapidly changing areas will create a new landscape for our industry niche of legal technology learning. Let's explore these driving forces in more detail and then we'll sketch some components we predict will construct the Next Generation Learning model.

## Driving Forces Behind Next Generation Learning

### Next Generation Technologies

We believe that technology will drive innovation in learning models because new kinds of technical competencies will become important for legal staff and lawyers. In the next five years or so, we'll see consolidation and commoditization of legal-specific software as more components move to the cloud and more law firms condense the number of third-party integrated applications they use. There will be less need for formal training on how to use customized desktop applications and more need for training on workflow, business processes and how to best leverage technology for the practice of law. We also expect emerging technologies and devices that are driven by "touch," "gesture" and other physical interaction to require different types of learning than traditional keyboard use. In fact, part of this driving force is the proliferation of non-IT controlled "consumer" devices on the network. These consumer-oriented devices will start to become the primary devices for system access. How can standardized training offerings support non-standardized device usage? Furthermore, we believe that knowledge management systems and processes will be "king" in law firms. This will present opportunities for new forms of learning through innovative access points to information.

Beyond technology driving the need for new skills, it also is driving Next Generation Learning by introducing new possibilities in how we build learning programs within organizations. Current and emerging technologies leveraged by universities and corporate training organizations include mobile learning, social and Web 2.0 learning, digital content (e-books) and even augmented reality and gaming. *The Horizon Report* of 2010, a collaborative project between The New Media Consortium and the Educause Learning Initiative,

examines these and other emerging learning technologies from the viewpoint of university education. Will law schools adopt these learning technologies and will new lawyers enter firms in five to ten years expecting continued development and learning to be offered in a similar fashion?

## Next Generation Law Firms

There is no question that the law firm business model is in a state of rapid change and many predict that, by the year 2020, an entirely new "normal" will emerge where law firms are using project management practices and technology to control resource allocation and cost in matters with alternative fee arrangements. In fact, we wonder how long "alternative fee arrangements" will be a relevant term as the law firm model changes and fixed fees and other new ways of pricing legal work become the norm.

Global thought leaders, such as Richard Susskind, predict that traditional roles in law firms will change and we'll see more specialists and business roles than administrative roles. The automation and standardization of processes and workflows will be critical to maintaining profitability; these processes and workflows will require new technology and new skills. Will legal secretaries become more project- or team-focused rather than lawyer-focused? What kinds of new technology and workflow skills will they require? We already see educational offerings for lawyers on project management and knowledge management. Where do the new business specialist roles fit in? How do technology and workflows need to be adapted for and taught to those individuals who need specialized solutions for their areas of expertise? How can technology education and educators provide value and relevance in this new law firm model?

## Next Generation Users

Finally, we believe the learners themselves will drive Next Generation Learning innovation. In "The 2020 Workplace," a book by Jeanne C. Meister and Karie Willyerd, they predict we will see five generations in the workplace at the same time for the first time ever. By 2020, law firms will have technology users who reflect the behaviors, values, needs, expectations and demands of five very different generations: Traditionalists, Baby Boomers, Generation X, Millennials and Generation 2020. This diversity in work behaviors and technical abilities will create a greater need for tailored and consultative learning programs.

Law firms are already challenged by the Millennials entering the picture with tech savvy, progressive ways that are contradictory to the status quo within law firms. Tom Gimbel writes in ALA's "Managing Millennials" *Legal Management* issue, published in 2007, that 70 percent of law firm partners are Baby Boomers and law firms will lose almost three-quarters of their partnerships over the next several years, which means Millennials will quickly become a major demographic within law firms. We've heard this group referred to as the Net Generation, Gen Y, Digital Natives and more. They have grown

---

“Within five to ten years, we believe that traditional classroom technology training as we know it will become extinct in law firms.”

---

up using technology and the Internet on a daily basis. This is a generation known for:

- **Rapid adoption of technology;**
- **A general disregard for IT policies and standardization;**
- **A strong desire for a personalized experience;**
- **A collaborative and relationship-based work environment; and**
- **An openness in mentoring and professional and personal development.**

What demands will this next generation of lawyers, support staff, technologists and clients place on the availability of technology and learning within law firms?

Multiple questions come to mind as we explore these areas of change and we begin to think about . . . what DOES Next Generation Learning look like for a law firm? We believe tomorrow brings a whole new approach to formal learning within law firms. And, perhaps even more significant, we believe informal learning in law firms will be paramount to the new technologies and user generations coming onboard in the months and years ahead.

## What does formal learning look like in the Next Generation?

We believe formal learning moves away from the classroom and into the “situation room.” Instructor-led learning will become situational in nature, rather than driven by monthly course catalogs and training offerings, and will be based on process, workflow and specific learner needs. The concept of turning trainers into performance consultants has been floating around for the past couple of years, but few firms have fully embraced such an approach because traditional classroom training is, well . . . traditional. And law firms hold tight to their traditions. But with the Next Generation law firm coming along, and with an increased need to train legal staff and lawyers in new concepts (e.g., project management) and efficient work processes, the notion of consultative, targeted learning tied to daily workflow becomes increasingly

valuable. Hunton & Williams of Richmond, Virginia provides an intriguing and innovative case study in how they have developed practice consultants to deliver this very type of targeted learning to practice teams.

Committed to finding a way to bring technology investments to maximum utilization, Hunton & Williams established their Practice Support Group in 2006. The idea was to create an environment where technologists become “embedded” in the legal process and educate legal teams on how technology can deliver competitive advantage at appropriate points in the life cycle of a matter. They observe the legal teams in their environments, identify areas within the workflow where technology can make a difference, and then develop a tailored training and development plan for each group. As these internal technology consultants become “part of the team,” they are involved and invested in the success of the legal team and the matters they handle. And with each engagement, these internal consultants learn more about the practice of law and are better equipped to identify the needs of the legal user. Ana Schuett, Practice Technology Support Manager, explains, “Our group has focus and a clear mission to provide the services of technology experts who understand the legal process and are invested in supporting the needs of the practice groups at Hunton & Williams.” The team has found that innovative ideas applied to day-to-day situations truly can make a difference.

The classroom won’t go away altogether. Technology rollouts and major upgrades are still best served by formal, hands-on or demo-style learning, though one could argue that large rollouts will become less common with the next generation of technology. But even in on-going skills development, there is still a time and place for guided, instructor-led, classroom learning, as many people do learn best this way. The classroom experience will need to adapt to leverage peer-to-peer learning and community building within the classroom and to accommodate the learning needs and styles of a multi-generational workforce. Furthermore, we believe that new technologies will allow for more feasible remote learning with better visualization and connectivity between and among learners and educators.

---

“By 2020, law firms will have technology users who reflect the behaviors, values, needs, expectations and demands of five very different generations.”

---

### How do we begin to formalize informal learning?

Legal technology users need to become agile learners now more than ever with rapidly changing roles, technology and environments. Yet, formal classroom training is anything but agile. Updates to curriculum and e-learning, scheduling and execution of classroom sessions are time-intensive processes. How do we facilitate learning in a world that needs to develop new awareness and skills on a regular basis? We believe the answer lies within informal learning. In fact, a number of studies show that people learn how to do their jobs through a blended learning model. One of our favorites is the 70-20-10 model architected by McCall, Eichinger and Lombardo at the Center for Creative Leadership. They conclude that 70 percent of learning occurs on the job performing daily tasks, 20 percent from feedback provided by peers or mentors and only 10 percent happening in formal learning programs.

With 90 percent of learning occurring outside of the classroom, we need to find a way to tap into the informal learning that happens daily among technology users. While many believe that the “formal” acknowledgement of informal learning signals the death of the traditional training profession, we believe that informal learning actually increases the value of the training professional in law firms. Because informal learning happens every day in every organization, we are encouraging learning professionals to find ways to become a partner and facilitator of the learning that naturally happens.

Our friends in the knowledge management profession are looking at ways to “formalize” informal knowledge sharing, much like we are looking to “formalize” informal learning. Can we leverage their hard work and technologies to bring knowledge and learning into one consolidated platform? IBM has developed a portal that combines learning and work to streamline the learning experience. Content is a shared responsibility of the training team, business experts and thought leaders. With this model, employees only have to visit one place. The search feature is vital, with results being customized based on the context of the employee’s role. While learning experts act as content moderators, IBM’s learners actually shape the learning experience using a rating and tagging system to bring forward content and information that is relevant. Key to the learning portal is the mix of resources, including those managed

in the learning management system (LMS), internal resources contributed by individuals and external resources.

We believe that technology is an enabler for change, but individuals are the heart of the movement. To truly embrace new ways of learning, we must consider that individuals experience learning differently. New forms of social learning using Web 2.0 technologies and innovative models for competency-based, peer-to-peer learning are two of the biggest trends on the horizon and will be components in Next Generation Learning in law firms.

### Social Learning and Community Building

ASTD (the American Society for Training and Development) partnered with the Institute for Corporate Productivity to research how organizations are using social media and Web 2.0 technologies for learning. The study finds strong evidence that the use of these tools for work-related purposes contributes to getting work done and learning more in less time.

So how do we move forward with our own social learning initiative? To say that the future of workplace learning is social seems odd given that work and learning have always been social. What is changing are the ways that we “socially” connect with each other. Social learning leverages the use of social media tools, allowing for access to relevant information and expertise in the context of daily work. Beyond the technology, it is about engaging, communicating, connecting and providing information at the moment of need, building communities of practice, finding experts and capturing knowledge where the learner is in control of what and how they learn. Social media tools include items such as microblogging, wikis, blogs, discussion forums, shared bookmarking sites and virtual communities.

Studies show that people learn more from each other informally on the job than they do in formal training programs, and much of what they learn in those moments is retained because the connection to the benefit is immediate. Historically in law firms, those communities met via e-mail, in the break room or in formal firm functions like practice area meetings. With online social tools, such as wikis and discussion boards, those communities of practice become transparent and the conversational knowledge is captured, shareable and most important, accessible by others at their moment of need.

---

# “Tomorrow’s learning professional understands when to guide the learning experience and when to allow for self-discovery and experiential learning.”

---

Social media are here to stay. Tomorrow’s CEO belongs to the Millennial Generation that replaced face-to-face conversation with text-based conversations. For these future leaders, social media have proved to be effective and efficient tools for informal communication and relationship building, and eventually for business benefits. Today, even within the legal industry, we begin to see business uses for social media. From the recent report by the National Center for State Courts, *Future Trends in State Courts 2010 — The Role of Social Networking Tools in Judicial Systems*, courts are adopting the use of blogs, Twitter and Facebook to enable a direct dialogue with the legal community. Courts can post summaries of rulings, procedural information, key dates and changes to room assignments, eliminating calls to the court or clerk’s office. Legal professionals are already recognizing the benefits and value of Web 2.0 communication. With lawyers and legal staff directly benefiting from these tools, both professionally and personally, how do we leverage social media tools to promote learning? The next generation of legal technology users will demand that we have an answer to this.

Within corporations, community tools such as blogs, wikis and discussion forums are utilized to overcome the same challenges we are facing in the legal profession: obsolescence of skills and knowledge, skill shortages due to constant change and the loss of knowledge that staff take with them when they leave. For inspiration on how law firms might address these obstacles, we turned our attention to our knowledge management peers and we discovered several stories about a large global law firm that has built a successful knowledge management community using social media tools. The firm is reporting success with a program that includes a full online social platform that utilizes blogs, wikis, social bookmarking and tagging. If they can do it, so can most law firms.

## Learning from Peers and Experts

Peer-to-peer learning should be built into both formal and informal learning programs. Learning will begin to stick through shared experiences that take place during the context of the work day. While we believe strongly in the power of using social media tools to share expertise, as learning professionals, we will want to identify our technical experts early on and forge

relationships with them based on mutual goals and trust. The law firm of Butzel Long has done just that through a unique program that allows Butzel team members to identify an expert to answer questions without having to wait for a special class, interrupt a colleague or risk receiving inaccurate information.

To assist in strategically developing the skills of an ever changing workforce, in 2006, the Butzel Learning and Development team collaborated with the firm’s legal secretaries to define a competency model that incorporates knowledge, skills, abilities and other attributes that lead to exemplary job performance. The program provides a progressive — or cascading — approach to development. The model is currently composed of eleven competencies, each having three distinct stages of development:

- **Learning:** In this stage, the legal secretary seeks to gain knowledge and awareness of the skill through e-learning, classroom instruction and/or on-the-job training.
- **Competency:** In this stage, the legal secretary has acquired the requisite skill and now possesses sufficient knowledge and experience to complete the task without guidance.
- **Mastery:** In the final stage, the legal secretary possesses extensive experience, applies best practices and can support the learning of others.

Regarding the design and implementation of the model, the firm’s Learning and Development Manager, Kurt Maaske, had this to say: “What we found is that a legal secretary displayed a propensity to acquire knowledge in certain skills. By focusing our efforts in assisting our secretaries to master those skills — Styles, for example — the overall benefit to the firm was substantially greater than focusing on developing a wide range of skills, which had been our approach in the past. While it is critical for the firm to have access to a wide range of skills, we found it was not imperative that each secretary possess every one, nor was it practical to assume they could.”

The true benefit with this approach has been identifying and recognizing subject matter experts (SMEs). These SMEs now support the learning and development of their peers by teaching instructor-led classes, coaching new employees and

providing experiential learning opportunities. Most important, they work with the Learning and Development team to capture knowledge and skills, as well as keep the team updated.

In addition to using the competency model as a development tool, the firm is also better prepared to identify and overcome potential skill gaps that can occur when knowledge leaves an organization. If a competency appears to be in short supply, specific emphasis is placed on learning experientially from one of the SMEs so that appropriate levels of expertise are consistently available.

Butzel is successfully establishing a “culture of collaboration” to give team members multiple ways of comfortably sharing their unique knowledge and expertise, and they’re recognizing the importance of communicating it throughout the organization.

## How Will You Shape the Next Generation?

Tomorrow’s learning professional understands when to guide the learning experience and when to allow for self-discovery and experiential learning. He or she strives to cultivate and nurture a collaborative learning environment, rather than attempting to contain or control it. We believe that our world is changing and that learning professionals need to be prepared to lead the creation of a Next Generation Learning model

within their firms. Now is the time to begin innovating, creating peer communities, understanding legal workflow, establishing technology subject-matter experts, leveraging social media and formalizing the process of informal learning in your firm. Just imagine what you can do. **ILTA**



Brie Stampe serves as Director of Market Strategies at Traveling Coaches where she leads the company’s strategic marketing and research efforts. Pairing 11 years of legal technology experience with an expertise in user adoption, Brie works to explore trends and collaboratively define the changing needs of legal technology learners. Brie has an MBA from Thunderbird with a concentration in global strategic marketing and business intelligence. She can be reached at [bstampe@travelingcoaches.com](mailto:bstampe@travelingcoaches.com).



Tami Schiller is a Learning Specialist/Futurist at Traveling Coaches. With over 12 years focused on legal technology training, Tami possesses a strong commitment to see individuals achieve their potential for technical competency by recognizing emerging trends and building partnerships at all levels. Tami is always looking for innovative ways to deliver learning opportunities to busy legal professionals. She can be reached at [tschiller@travelingcoaches.com](mailto:tschiller@travelingcoaches.com).